

Fig 1

110

T_PROCESS	
prcs_id	
comp_id	
prcs_title	
prcs_docum	
usage_status	
is_well_formed	
nextstep_due_mon_shift	
nextstep_due_tue_shift	
nextstep_due_wed_shift	
nextstep_due_thu_shift	
nextstep_due_fri_shift	
nextstep_due_sat_shift	
nextstep_due_sun_shift	
creator_id	
lastmod_id	
created_on_dttm	
lastmod_dttm	

111

T_PROCESS_STEP	
step_id	
prcs_id	
is_deleted	
step_num	
step_title	
step_docum	
lo_prob_of_win	
hi_prob_of_win	
created_on_dttm	
lastmod_dttm	

112

T_STEP_RESULT	
result_id	
step_id	
is_deleted	
result_num	
result_title	
next_step_id	
mark_deal_outcome	
nextstep_owner_meth	
intrvl_till_nextstep_due	
intrvl_unit	
ok_to_edit_nextstep_due	
created_on_dttm	
lastmod_dttm	

120

T_DEAL	
deal_id	
prcs_id	
ldsrc_id	
deal_desc	
deal_status	
deal_outcome	
deal_outcome_dt	
deal_start_dt	
deal_finish_dt	
deal_value	
deal_owner_id	
deal_creator_id	
deal_lastmod_id	
created_on_dttm	
lastmod_dttm	
deal_note	
latest trak_id	

121

T_DEAL_TRACK	
trak_id	
deal_id	
trak_num	
step_id	
prob_of_win	
step_owner_id	
ok_to_edit_owner_id	
step_due_dt	
ok_to_edit_due_dt	
step_creator_id	
step_lastmod_id	
created_on_dttm	
lastmod_dttm	
prevstep_cmpit_dt	
step_note	
result_id	
step_completor_id	
user_entered_cmpit_dt	
system_dttm_at_cmpit	
deal_outcome_aft_cmpit	
deal outcome dt aft cmpit	

113

T_STEP_AUTOTASK	
autotask_id	
step_id	
task_type	
task_purpose	
task_priority	
task_desc	
task_note	
created_on_dttm	
lastmod_dttm	

122

T_DEAL_WL_REASON	
deal_id	
wl_reas_id	
creator_id	
created_on_dttm	

113

T_WONLOST_REASON	
wl_reas_id	
comp_id	
which_kind	
is_enabled	
wl_reas_name	

Fig. 2

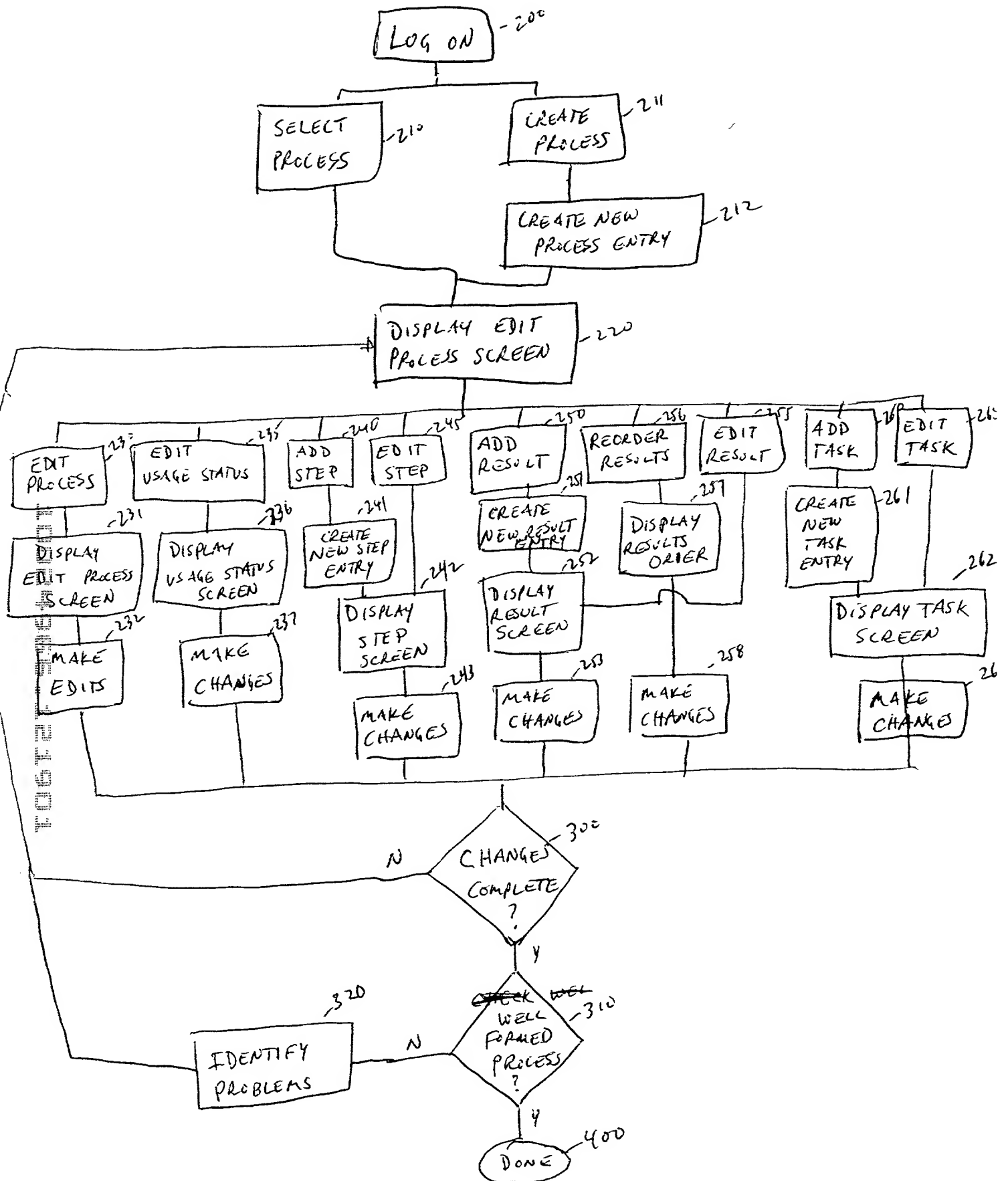


FIG. 3

② Setup : Process Builder - Edit

51) Process Name: Inbound Call (Edit) (A)

512) Usage Status: Active (Change) (B)

(C)

Add Step

Print View

Copy Process

(F) Add Result | Add Auto Task (E)

Step 1: Qualify (0% - 10%)

520) Results( reorder) (D)

Qualified (535)

531) Not qualified

532) Already asked to buy

533)

Auto Tasks

540) Research company financials (E)

541)

Goto Next Step Due Next Step Owner

2 [1 week, Adj] [User Delegated]

Lost 7 [1 week, Adj] [Current Step Owner]

Won 6 [1 week, Adj] [Current Step Owner]

Task Type

Task Purpose

Qualify

Step 2: Contact Prospect (0% - 0%)

Results( reorder)

Phoned - set up demo

Phoned - left message

Faxed

Emailed

Goto Next Step Due Next Step Owner

4 [2 weeks, Adj] [Current Step Owner]

5 [3 days, Adj] [Current Step Owner]

5 [3 days, Adj] [Current Step Owner]

3 [4 days, Adj] [Current Step Owner]

Add Result | Add Auto Task

Step 3: Schedule Demo (10% - 40%)

Results( reorder)

Scheduled it

Prospect decided not to continue

Goto Next Step Due Next Step Owner

4 [2 weeks, Adj] [User Delegated]

Lost 7 [1 week, Adj] [Current Step Owner]

Auto Tasks

Check prospect's availability

Task Type

Task Purpose

Phone Call

Step 4: Give Demo (50% - 50%)

Results( reorder)

Gave demo - interested

Gave demo - not interested

Demo postponed

Goto Next Step Due Next Step Owner

5 [2 weeks, Adj] [User Delegated]

Lost 7 [1 week, Adj] [Current Step Owner]

5 [2 weeks, Adj] [User Delegated]

Add Result | Add Auto Task

Step 5: Close Deal (100% - 100%)

Results( reorder)

Won Deal

Lost Deal

Goto Next Step Due Next Step Owner

Won 6 [1 week, Adj] [Current Step Owner]

Lost 7 [1 week, Adj] [Current Step Owner]

Add Result | Add Auto Task

Step 6: Fill out win/loss report (won) (100% - 100%)

Results( reorder)

Done

Not done

Goto Next Step Due Next Step Owner

Won 1 [Finished]

5 [1 week, Adj] [Current Step Owner]

Add Result | Add Auto Task

Step 7: Fill out win/loss report (loss) (100% - 100%)

Results( reorder)

Done

Not Done

Goto Next Step Due Next Step Owner

Lost 1 [Finished]

5 [1 week, Adj] [Current Step Owner]

Add Result | Add Auto Task

FIG 4A

A

Fig. 4B

## Setup : Process Builder - Process Properties

### Process Properties

Process Name: Inbound Call

Process Description: To handle all incoming calls

### Business Day Shifting

Monday:	None
Tuesday:	None
Wednesday:	None
Thursday:	None
Friday:	None
Saturday:	+ Mon
Sunday:	+ Mon

Save

Cancel

B

Microsoft Internet Explorer

**Change Process Usage Status**

Process Name: **Inbound Call**

Current Usage Status: **Active**

New Usage Status: ☐ Inactive ☒ Under Construction

**Save** **Cancel**

C

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Delete

**? Edit Step**

\* Step Name:

Step Description:

\* Probability of Winning: Low  % High  %

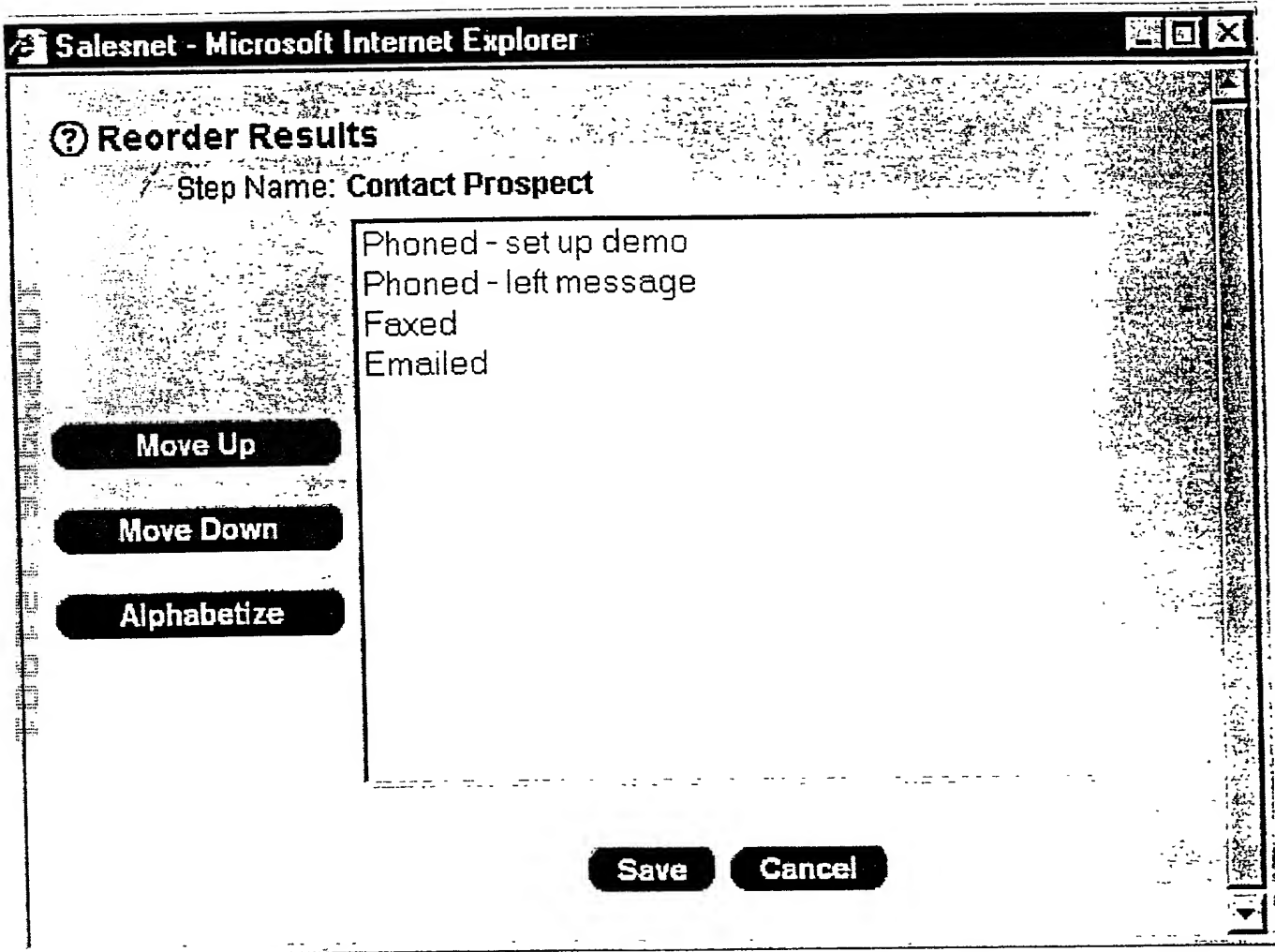
Display Position:

☐ Save and Add another Step

☒ Save and Return to Process

Save Cancel

D





E

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Delete

### Edit Auto Task

\* Task Description:

Task Type:

Task Purpose:

Task Priority: ☒ Normal ☐ High

Task Note:

☐ Save and Add another Auto Task  
☒ Save and Return to Process Builder

Save Cancel

F

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Delete

? Edit Result

Step 1: Qualify

\* Result Name:

Navigation:

☒ Go to Step

☐ Mark Deal as Finished

Deal Outcome:

☒ Mark the Deal as Won

☐ Mark the Deal as Lost

Time Interval:   ☒ Allow User to Modify Due Date

(From this Step's Completion Date until the next Step's Due Date)

Next Step Owner:

☒ Owner of the Current Deal Step

☐ Owner of the Deal

☐ Allow User to Delegate the Next Step Owner

☐ Save and Add Another Result

☒ Save and Return to Process Builder

Save Cancel

## ② Setup : Won/Lost Reason Codes

### Reasons for Won Deals

Add

		Reason	Status
<u>Edit</u> <u>G</u>	<u>Del</u>	Faster	Active
<u>Edit</u>	<u>Del</u>	Smarter	Active
<u>Edit</u>	<u>Del</u>	Stronger	Active

### Reasons for Lost Deals

Add

		Reason	Status
<u>Edit</u>	<u>Del</u>	Decided not to commit at this time	Active
<u>Edit</u>	<u>Del</u>	Went with competitor	Active

6

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**Edit Won Reason Code**

Description:

Status: ☒ Active ☐ Inactive

☐ Save and Add another Reason Code

☐ Save and Return to setup page

☒ Save and Return to Reason Code list.

## Setup: Activity Types and Purposes

### Activity Types

Activity Types		Types	Status
<u>Edit</u>	<u>Del</u>	Email	Active
<u>Edit</u>	<u>Del</u>	Fax	Active
<u>Edit</u>	<u>Del</u>	Letter	Active
<u>Edit</u>	<u>Del</u>	Phone Call	Active

Add

### Activity Purposes

Activity Purposes		Purposes	Status
<u>Edit</u>	<u>Del</u>	Qualify	Active
<u>Edit</u>	<u>Del</u>	Whatever	Active

Add

H

FIG. 41

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**Edit Activity Type**

Description:

Status: ☒ Active ☐ Inactive

☐ Save and Add another Type

☐ Save and Return to setup page

☒ Save and Return to List

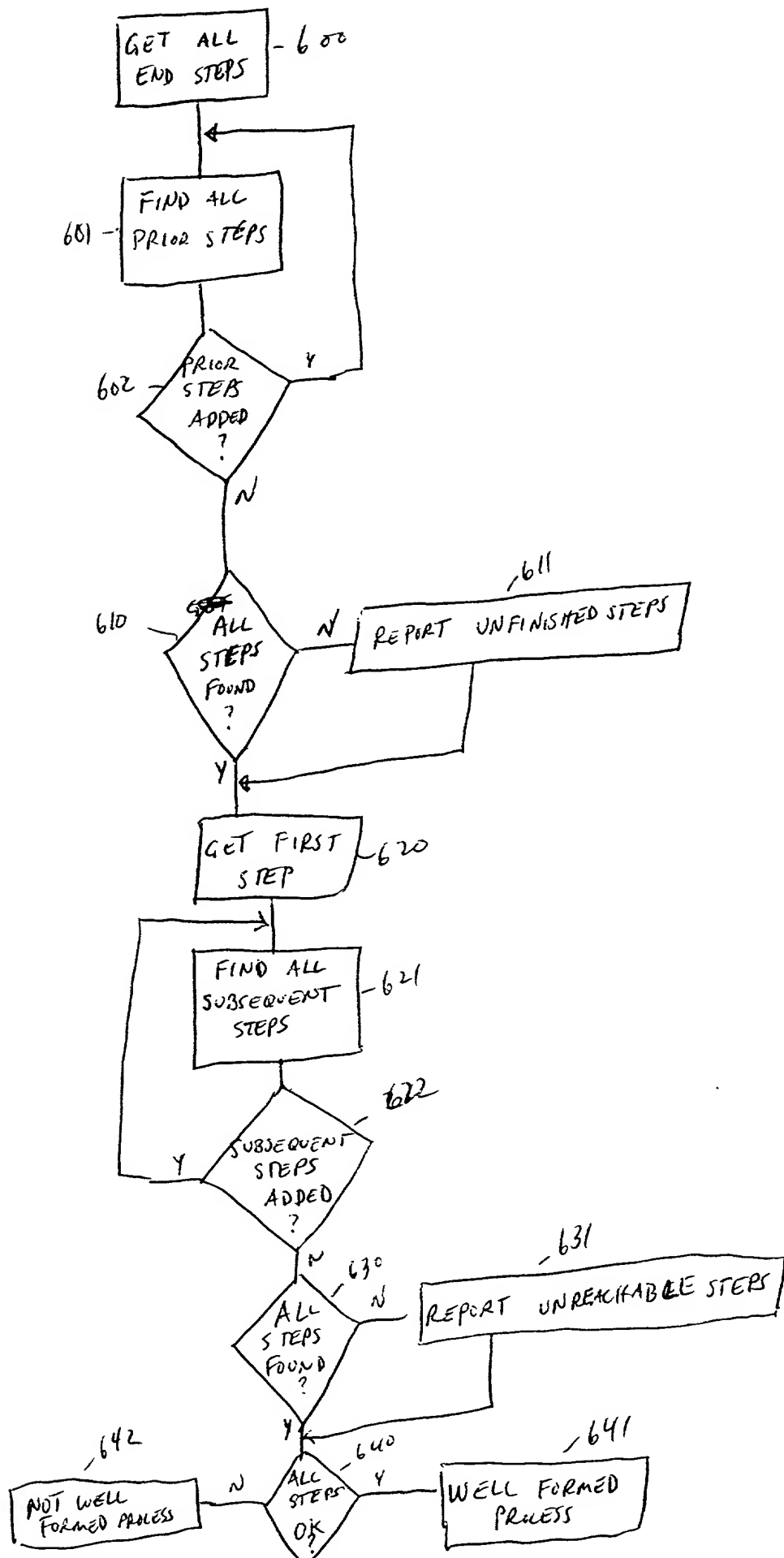


FIG. 5

ACCOUNTS	CONTACTS	DEALS	DEAL DETAIL	DEAL STEP																																																	
<p><b>El Coloso Deal #011 (This Deal is Open)</b></p> <p>Address: Inbound Call            Primary Contact: Jacobo Abreu 507-274-0556</p> <p style="text-align: right;"><b>Edit Current Step</b></p>																																																					
<p><b>Current Step Detail</b></p> <p>Step Owner: O'Connell, Diane</p> <p>Step Due: 02/14/2001</p> <p>Step Prob: 100 %</p> <p>Step Notes:</p>																																																					
<p style="text-align: center;"><b>Deal History</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Step</th> <th style="width: 15%;">Completed</th> <th style="width: 15%;">Step</th> <th style="width: 15%;">Result</th> <th style="width: 15%;">Completed By</th> <th style="width: 10%;">Prob.</th> <th style="width: 10%;">Deal Outcome</th> </tr> </thead> <tbody> <tr> <td><u>edit</u> <u>undo</u></td> <td>02/07/2001</td> <td>Give Demo</td> <td>Gave demo - interested</td> <td>O'Connell, Diane</td> <td>50 %</td> <td></td> </tr> <tr> <td colspan="7" style="padding: 5px;">The demo went well. I was informed that a decision should be made by next week.</td> </tr> <tr> <td><u>edit</u> <u>undo</u></td> <td>01/13/2001</td> <td>Contact Prospect</td> <td>Phoned - set up demo</td> <td>O'Connell, Diane</td> <td>0 %</td> <td></td> </tr> <tr> <td colspan="7" style="padding: 5px;">Will give demo to 5 decision-makers at their offices.</td> </tr> <tr> <td><u>edit</u> <u>undo</u></td> <td>01/24/2001</td> <td>Contact Prospect</td> <td>Phoned - left message</td> <td>O'Connell, Diane</td> <td>0 %</td> <td></td> </tr> <tr> <td><u>edit</u> <u>undo</u></td> <td>01/17/2001</td> <td>Qualify</td> <td>Qualified</td> <td>O'Connell, Diane</td> <td>10 %</td> <td></td> </tr> </tbody> </table>					Step	Completed	Step	Result	Completed By	Prob.	Deal Outcome	<u>edit</u> <u>undo</u>	02/07/2001	Give Demo	Gave demo - interested	O'Connell, Diane	50 %		The demo went well. I was informed that a decision should be made by next week.							<u>edit</u> <u>undo</u>	01/13/2001	Contact Prospect	Phoned - set up demo	O'Connell, Diane	0 %		Will give demo to 5 decision-makers at their offices.							<u>edit</u> <u>undo</u>	01/24/2001	Contact Prospect	Phoned - left message	O'Connell, Diane	0 %		<u>edit</u> <u>undo</u>	01/17/2001	Qualify	Qualified	O'Connell, Diane	10 %	
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<u>edit</u> <u>undo</u>	01/17/2001	Qualify	Qualified	O'Connell, Diane	10 %																																																



I

COUNTS	CONTACT
Coloso Deal (#01)	
Inbound Call	
Contact: Jacob Ab	

Step Detail

Step Name: Close De:  
Step Due: 02/14/2001  
Step Notes:

undo	Completed
02/07/2001	The demo w
01/31/2001	Will give der
01/24/2001	
01/17/2001	

Complete Current Step

Deal: El Coloso Deal (#01) ( This Deal is Open )

Current Step: Close Deal

Current Step Owner: O'Connell, Diane

Step Completion Date: 02/15/2001

Step Result: Won Deal

Notes:

Next Step Detail

Next Step: Fill out win/loss report (won)

Owner of Next Step: O'Connell, Diane

Due Date of Next Step: 02/22/2001

Probability of Winning: 100 %

The Deal Outcome will be 'Won'.

Select one or more reasons, if applicable:

Faster  
Smarter  
Stronger

Save

Cancel

# h

79  
F16.

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**Undo Confirmation**  
This will make Close Deal the current step. Any information you logged for this step will be deleted.

OK Cancel

Step Detail

Name: Fill out win/loss report (won) Ste

p Due: 02/22/2001

Notes:

Completed Step

undo 02/15/2001 Close Deal

undo 02/07/2001 Give Demo

The demo went well. I was informed that a decision should be made by next week.

undo 01/31/2001 Contact Prospect

Will give demo to 5 decision-makers at their offices.

undo 01/24/2001 Contact Prospect

undo 01/17/2001 Qualify

Won Deal O'Connell, Diane 100 %

Gave demo - interested O'Connell, Diane 50 %

Phoned - set up demo O'Connell, Diane 0 %

Phoned - left message O'Connell, Diane 0 %

Qualified O'Connell, Diane 10 %

Deal Outcom

Won

Fig. 6D

10024966-12901

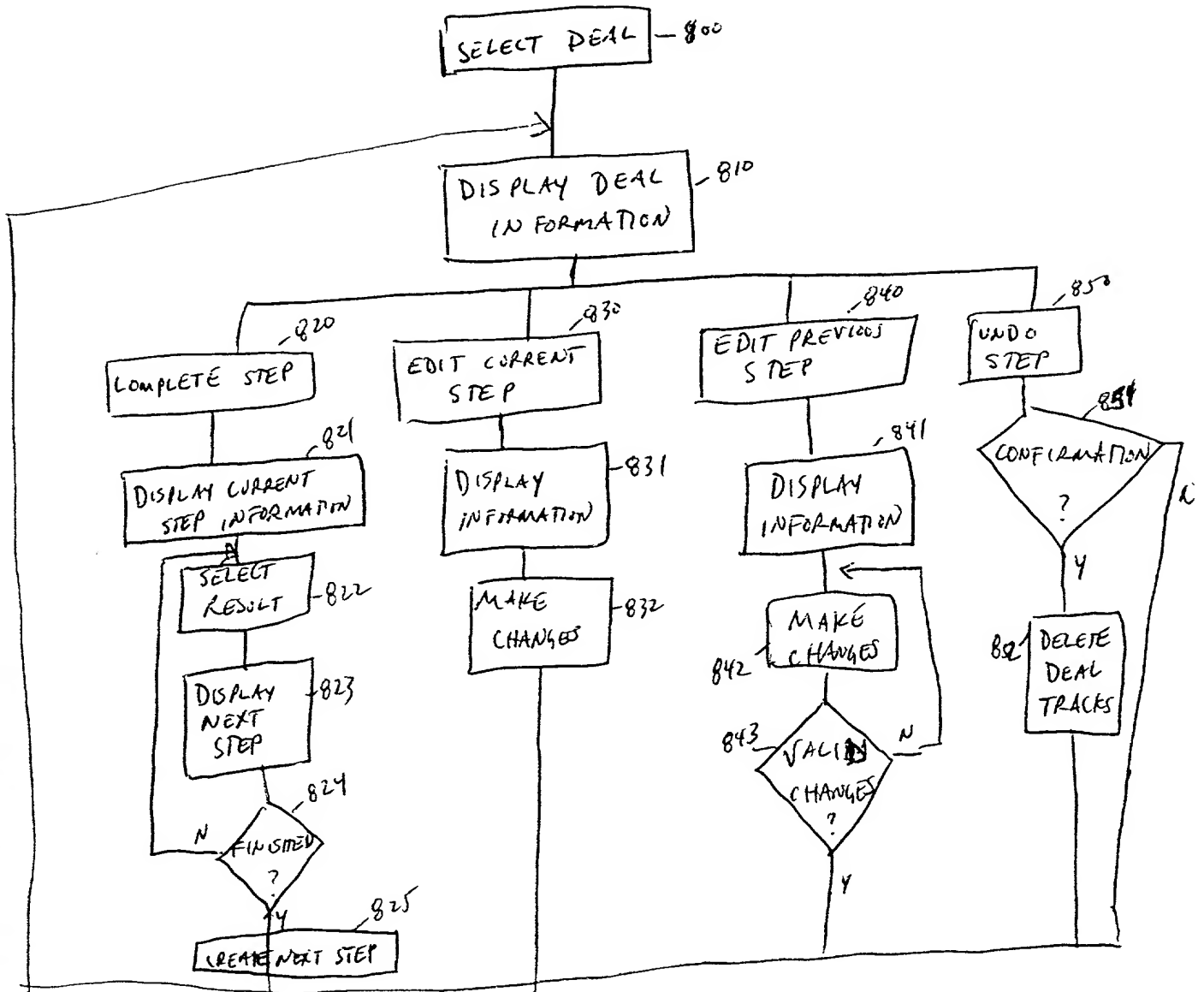


FIG 7